

2023 INCOME TAX RETURN CHECKLIST

(Please complete and return with your tax information)

Please use this checklist to help organize all the items required to complete your tax return. Please check off appropriate boxes. Please be sure to advise us of any changes in address or marital status. If you, or a family member, have become disabled during the year you may be eligible for additional tax credits. If you have had a child enter your family ensure that you provide a name, a date of birth and the sex of your child.

Name:					
Name:					
Children					
Phone:	(during day)	(home)	(ce	ll phone)	
Email:					
ΝΟΤΕ:	Canada Revenue Agency (CRA) requires that if you owned foreign income producing property with a cost of more than \$100,000 (Cdn) at any time during 2023 you must provide certain information on your tax return. Please advise us if this applies to you. CRA now requires taxpayers to report the sale of any real estate. This rule will apply even if the property is your principal residence. Please advise us if you sold any property in 2023.				
INCOME			<u>'X'</u>	Additional information	
INCOME: Employment:	(T4, T4A)				
Investment/inter	rest/dividends: (T3, T5, T5013)				
Pensions:	RRSP/RRIF/Annuities Canada Pension Old Age Security Employer	T4RSP, T4RIF,T4A T4A(P) T4OAS T4A			

Business (complete schedule which can be found at www.blrcpa.ca):

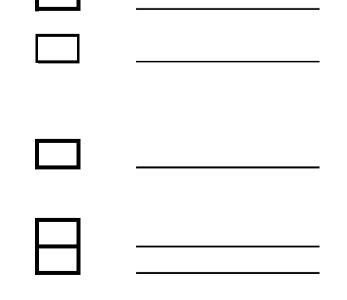
Rental property (complete schedule which can be found at www.blrcpa.ca):

Capital gains/losses: - Sale of investments - provide information on original cost, proceeds, expenses, dates

- Broker statements or summaries would be very helpful
- Annual statements from Mutual Fund companies

Other income (please provide details on separate page):

- Spousal support
- Other sources of income for which no slips were received.



CHECKLIST CONTINUED:		<u>'X'</u>	Additional information
DEDUCTIONS			
RRSP contributions: receipts req	uired		
Union or professional dues: (if r	ot included on your T4)		
If your child attend	s and SIN of caregiver, if applicable ded an overnight camp er of weeks at camp.		
Carrying charges:	interest management fees	\square	
Employment/commission expense - include T2200 or T22005	s (complete employment expense schedule (www.blrcpa.ca) S from your employer)		
	ts (provide breakdown between child and spousal support) <mark>u moved 40 kms closer to a new place of work)</mark>	\square	
NON-REFUNDABLE TAX C	REDIT INFORMATION		
website and have dependant Medical expenses paid, including h - enclose all receipts	s - obtain the T2202 via the student's access to the school's ts sign the T2202 where requested ealth insurance premiums ler obtaining a summary from your pharmacy		
- all pages are required	clude agreement of purchase and sale) eipts) ts)		
PROVINCIAL TAX CREDIT	INFORMATION		
Rent or property tax paid on prin (obtain and include receipts displa (provide copy of final property tax	ying address and landlord's name if you rent)		

INCOME TAX INSTALMENTS MADE DURING THE YEAR

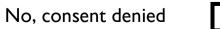
Are you a U.S. citizen, a U.S. green card holder or were you born in the U.S.?

CRA, in conjunction with Elections Canada, asks whether or not you will give your consent to provide Elections Canada with your name, address and date of birth only. I am a citizen of Canada Yes

The purpose of this is to keep the National Register of Electors up to date for future elections. Would you please indicate your decision on this matter below.

Yes, consent given

Yes



No

No